

Compliance and Control for Phone Booking [New]

Phone Booking utilizes artificial intelligence to facilitate appointments through conversational scheduling.

In this article, we will detail the necessary permissions, the scope and boundaries of the AI conversation, and how phone numbers are managed to ensure a **secure and controlled environment** for all your meetings.

Account Permission and Agreement

Before any user can use Phone Booking for their Booking Calendars, the Account Owner must explicitly authorize it for the account.

- **Express Permission:** The Account Owner is required to manually toggle on the Phone Booking feature for the account.
- **Terms Agreement:** Toggling on this feature signifies that you, as the Account Owner, officially agree to the [Phone Booking Terms](#).

Bounded AI Conversation

The AI-powered conversation is designed to be narrow and focused, ensuring the guest's interaction is secure and goal-oriented.

- **Limited Scope:** Phone Booking only permits guests to **schedule a booking** or **leave a message**.
- **No Setup Required:** You do not need to write any AI prompts, provide data, or input instructions. The feature **works instantly** right out of the box.

Dedicated Phone Number Management

Users can generate a unique, system-generated phone number for every specific Booking Calendar and Booking Hub where they intend to use Phone Booking.

- **Unique Number Assignment:** Every **Booking Calendar** or **Booking Hub** receives its own dedicated, unique phone number.
- **Number Cool-Off Period:** When a Booking Calendar or Booking Hub is deleted, it **releases** its phone number. That number enters a 90-day cool-off period during which it remains inactive. This guarantees two things:
 - When you **delete** a number, no one else will use it for at least 90 days.
 - When you **generate** a new number, you are guaranteed that it has been out of use for at least 90

days.

Secure Environment

Phone Booking is built on a highly secure infrastructure to ensure the privacy of all guest interactions and data.

- **Hosting:** The service uses **Secure Azure hosting** for a foundation of robust, enterprise-level security.
 - **Dedicated AI:** The feature runs on a **Private OpenAI instance**, guaranteeing that the AI environment is controlled and secure.
 - **Data Privacy:** Your data and your guests' data are **never used for AI training**, ensuring complete data privacy.
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Recording, Transcription, and AI Summary

All Phone Booking calls are processed to provide a comprehensive record, which is available in **Activities** for review and follow-up.

- **Call Records:** All conversations are **recorded, transcribed, and summarized** using AI.
- **Caller Notification:** Users must inform callers that the conversation is being recorded. This can be done by using the **welcome message**, which by default states that the recording will be provided to the business being contacted, or by customizing the welcome message as necessary.
- **Data Deletion:** Recordings, transcripts, and summaries can be permanently removed by deleting the corresponding phone call activity.

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IMPORTANT: Audio recording of Phone Booking conversations cannot be turned off.
